



## Council Workshop Meeting

### Addendum

**Date:** November 24, 2020  
**Time:** 9:30 a.m. and 1:00 p.m.  
**Location:** Council Chambers - members participating remotely

Pages

#### 4. Regular Items:

##### 4.1. Strategic Plan check-in and review #2

- a. *Staff Presentation regarding strategic plan check-in and review #2 (CWC-07-20)* 1 - 81

##### 4.2. Risk governance framework

- a. *Staff Presentation regarding risk governance framework (CWC-08-20)* 82 - 84
- b. *Risk governance principles, policy objectives and decision making (CWC-08-20)* 85 - 87

# Strategic Plan Check-in & Review

Council Workshop #2

November 24, 2020

# Agenda

- Introduction
- Focus Area 4
  - Heather Keam, Team Lead, Cities Deepening Community, Tamarack Institute & Debra Jakubec, Abundant Community Edmonton Project Manager, Community Standards and Neighbourhoods, Citizen Services Department, City of Edmonton
  - Dr. Dale Kalina, Medical Director of Infectious Diseases, Joseph Brant Hospital
  - Denise Beard, Manager of Community Development Services, City of Burlington
  - Workshop Discussion
- Focus Area 5
  - Shann McGrail, Executive Director, Haltech Regional Innovation Centre (15 minutes)
  - Christine Swenor, Chief Information Officer, City of Burlington (10 minutes)
  - Angela Morgan, Executive Lead - Customer Experience, City of Burlington (10 minutes)
  - Workshop Discussion
- Workshop #1 Re-Cap
- What Comes Next

## Focus Area 4: Building More Citizen Engagement, Community Health and Culture

- Heather Keam, Team Lead, Cities Deepening Community, Tamarack Institute &  
Debra Jakubec, Abundant Community Edmonton Project Manager, Community Standards and Neighbourhoods, Citizen Services Department, City of Edmonton (15 minutes)
- Dr. Dale Kalina, Medical Director of Infectious Diseases, Joseph Brant Hospital (10 minutes)
- Denise Beard, Manager of Community Development Services, City of Burlington (10 minutes)
- Workshop Discussion (15 minutes)

## Focus Area 4: Building More Citizen Engagement, Community Health and Culture

Heather Keam

Team Lead, Cities Deepening Community  
Tamarack Institute

&

Debra Jakubec

Abundant Community Edmonton Project  
Manager

Community Standards and Neighbourhoods  
Citizen Services Department  
City of Edmonton



# Burlington Strategic Plan Workshop November 24, 2020

# Trends in Community

- *Change in Family and social structures-*
- *Work and time*
- *Cost more to be socially connected-*
- *People spend more time in their car*
- *Technology*
- *Decrease in resident participation in community life, lack of connection to community*
- *Increase in loneliness and social isolation*
- *Lack of connection to civic life*



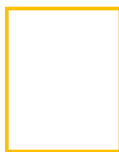
# The Solution



People and Communities  
have *deficiencies & needs*

Individuals and Communities  
have *assets and capacities*

**Doing-for  
the community**



**Doing with the  
community**

# A Story- Building Community bottom up



Source GoGraph.com

# Abundant Community Edmonton



GET NEIGHBOURING

# ACE Framework



# ACE Timeline

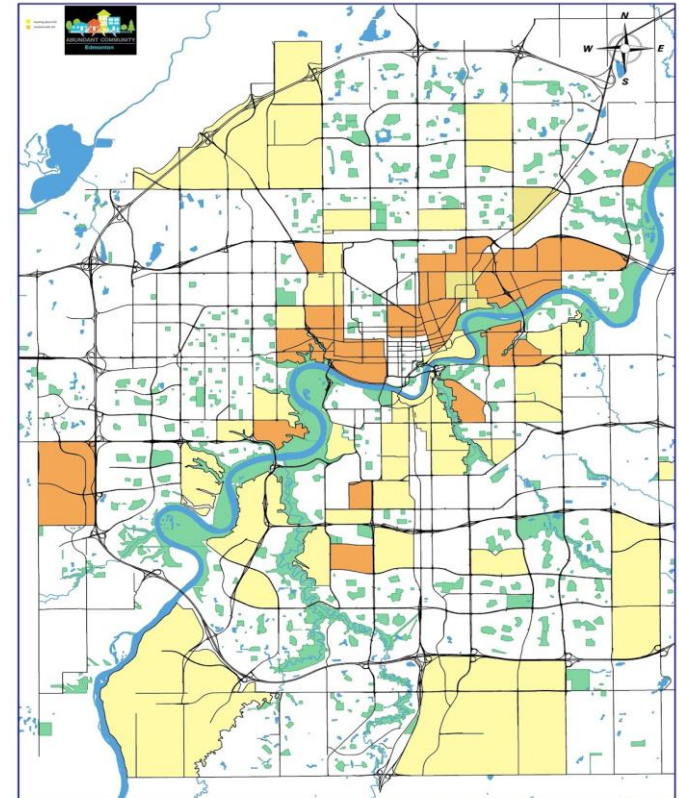
- **2014** neighbourhood approaches, start with 4 neighbourhoods
- **To 2017** strong outcomes and growth
- **2017** from community feedback Councillor suggests service package
- **2017** Service package approved
  - 3.5 FTE
  - Programming funds

# Pre-funding

## Early 2017

- **43** neighbourhoods are Initiating
- **35** neighbourhoods are Active

*\*Edmonton has 280 residential neighbourhoods*



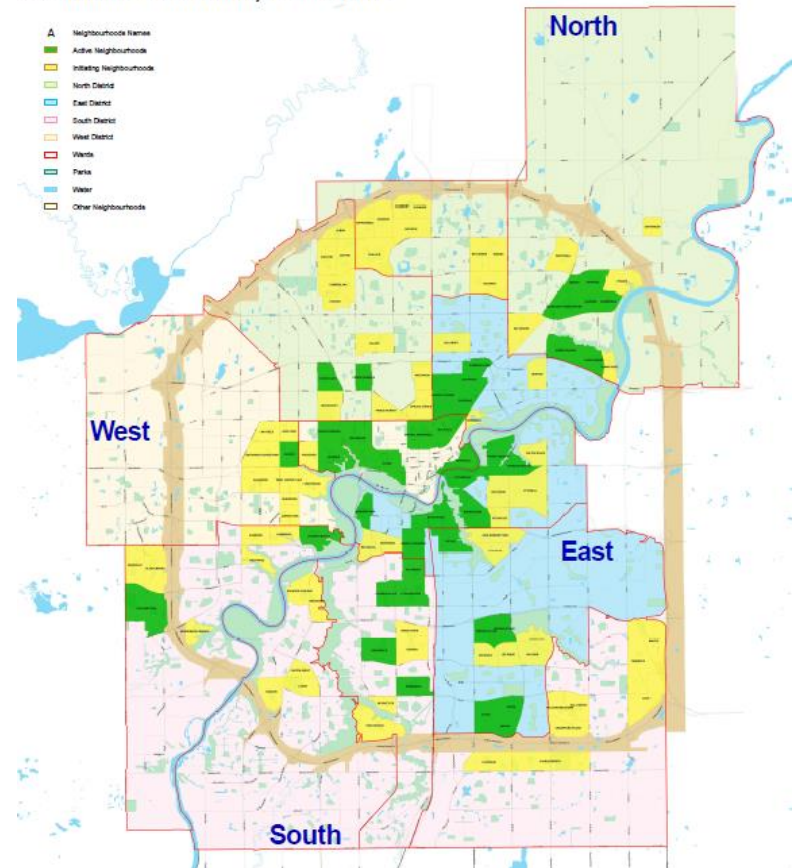
Abundant Community Edmonton (ACE)

# Post-funding

## Current 2020

- **86** neighbourhoods are Initiating
- **66** neighbourhoods are Active
- Over **530** Block Connectors

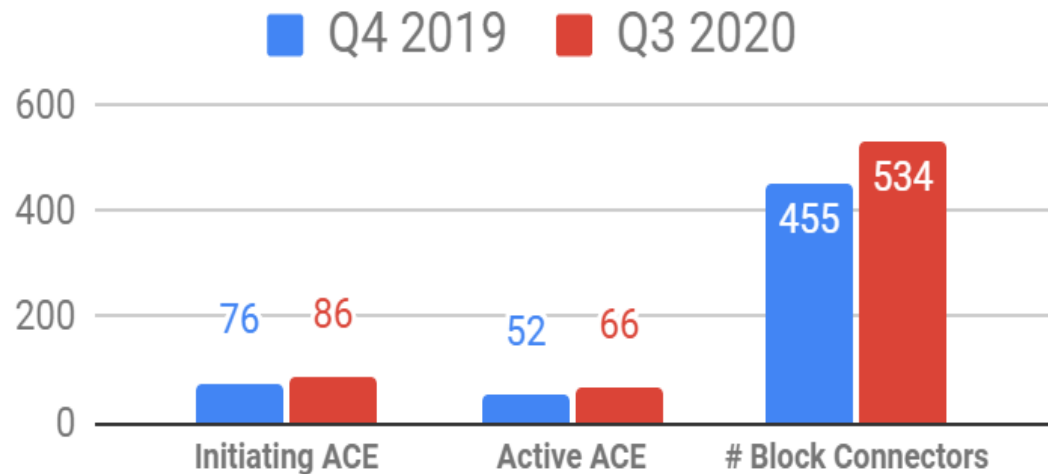
Abundant Community Edmonton



# ACE Growth

- Increased interest this year due to COVID-19
- From Feb. – Sept. **97** people attended our '*Creating a Neighbourly Vibe with ACE*' workshop

## ACE Growth - Q4 2019 and Q3 2020



# Benefits of a Neighbouring Initiative

**Inclusivity** – Increased Health & Wellness – Social Care  
Supporting Mental Health & Spirituality – **Companionship**  
**Sense of Belonging** – Recreation Opportunities  
Decreasing Seniors Isolation – **Care of Shared Spaces**  
Increased Safety – Disaster Preparedness – **Poverty**  
**Reduction** – Environmental Sustainability  
Youth Mentoring – **Resident Retention**  
**Business and Social Innovation** – Citizen Engagement

# Areas of Increased Neighbourhood Engagement

- Health
- Safety and Security
- Environment
- Local Food Production
- Nurturing Local Economy
- Raising Connected Children
- Care for the Community



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## Focus Area 4: Building More Citizen Engagement, Community Health and Culture

Dr. Dale Kalina

Medical Director of Infectious Diseases  
Joseph Brant Hospital

# Community Health: Statistics, Trends, and COVID-19

Dale R Kalina, MD FRCPC

Medical Director, Infection Prevention and Control, Joseph Brant Hospital

# During this talk you will...

- Learn About Current Trends in Community Health in Burlington and Halton
- Explore How These Trends Impact the City of Burlington's 25 Year Plan and BEDC's Strategy
- Impact of COVID-19 on Community Health

# Focus Area 4

Focusing on the health and wellbeing of older adults and being recognized as an age-friendly city

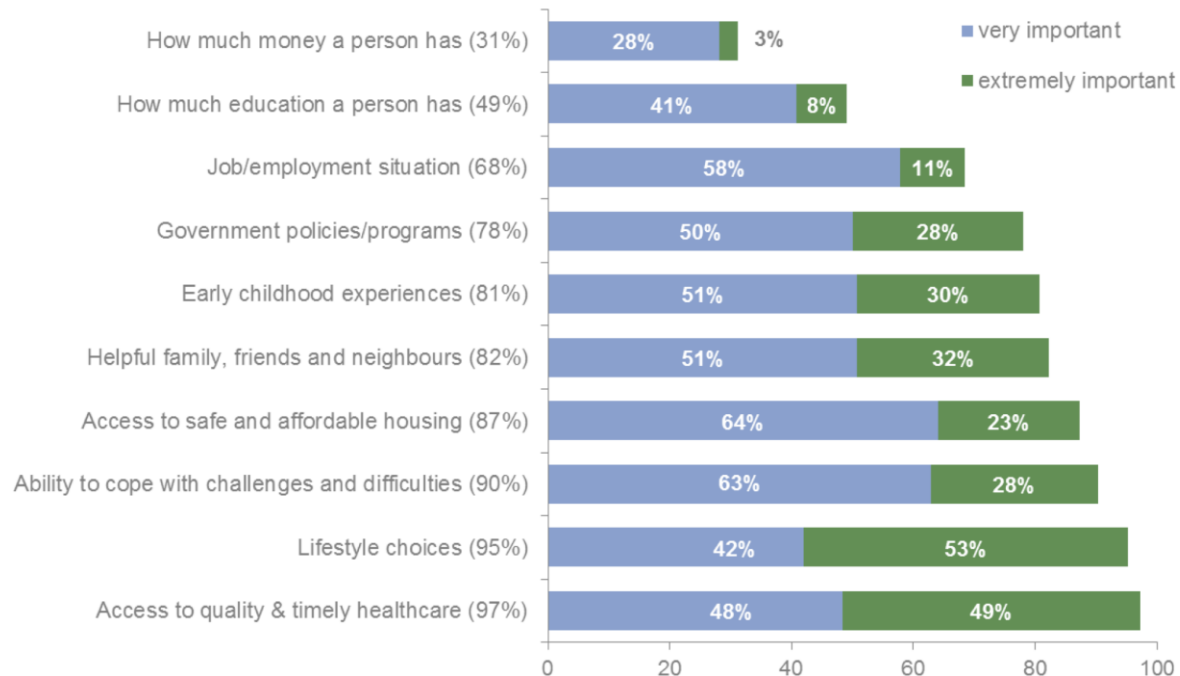
Citizen wellbeing through walkable and bikeable access to green space

Focusing on recreational programming for growing and more diverse community

# Halton Statistics

- 49% are overweight or obese
- 1 in 6 residents smoke
- 54% don't eat enough fruits or vegetables
- 48% are inactive in leisure time
- 20% are heavy drinkers

Source: <https://www.halton.ca/For-Residents/Public-Health/Health-Equity>

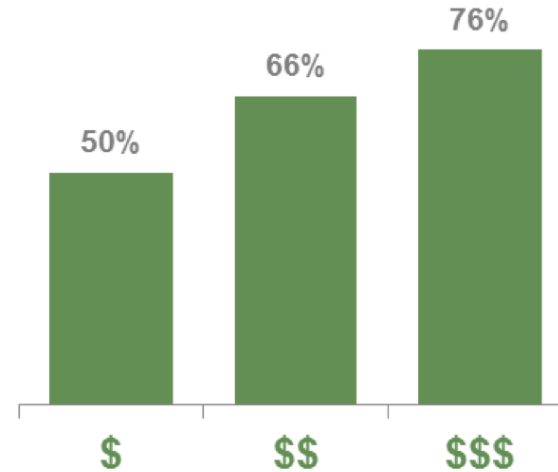


# Social Determinants of Health

# Trends in Community Health

- Covid-19
- Mental health
- Access to care

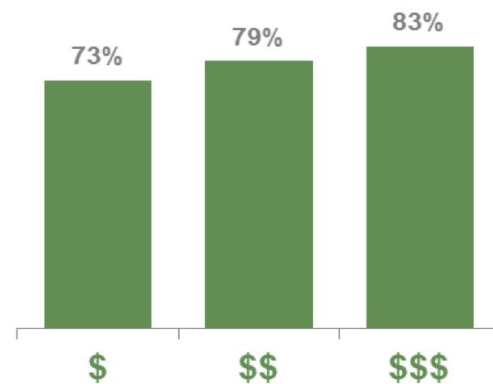
# Self-Rated Health by Income



Percentage of adults aged 19+ who rated their general health as “very good” or “excellent”, by income, Halton 2013/14

*Source: Canadian Community Health Survey, 2013/14*

# Self-Reported Mental Health by Income



Percentage of adults aged 19+ who rated their mental health as “very good” or “excellent”, by income, Halton 2013/14

*Source: Canadian Community Health Survey, 2013/14*

- Source:  
<https://www.halton.ca/Repository/Halton-Region-Mental-Health-Infographic>

## 1 in 10

Halton adults aged 18-64 have been diagnosed with a mood and/or anxiety disorder.



In Halton, life satisfaction decreased as age increased. However, older adults (65+) reported being less stressed and having a stronger sense of community belonging than adults aged 18-64.



From 2006 to 2015, the rate of emergency department visits for mental illness in Halton increased by 24%, while the rate of hospitalizations for mental illness increased by 36%.

# Winter is Coming

- <https://www.halton.ca/Repository/Winter-Fun-Activities-Indoors-and-Out>



# COVID-19 and Community Health

- Gender inequality
- Socioeconomic inequality
- Access to healthcare

## Focus Area 4: Building More Citizen Engagement, Community Health and Culture

Denise Beard  
Manager of Community Development  
Services  
City of Burlington



## Building More Citizen Engagement, Community Health and Culture

*In the Time of Pandemic*

*And the people stayed home.*

*And they read books, and listened, and rested, and exercised, and made art, and played games, and learned new ways of being, and were still.*

*And they listened more deeply. Some meditated, some prayed, some danced. Some met their shadows. And the people began to think differently.*

*And the people healed.*

*And, in the absence of people living in ignorant, dangerous, mindless, and heartless ways, the earth began to heal.*

*And when the danger passed, and the people joined together again, they grieved their losses, and made new choices, and dreamed new images, and created new ways to live and heal the earth fully, as they had been healed.*

*Kitty O'Meara*



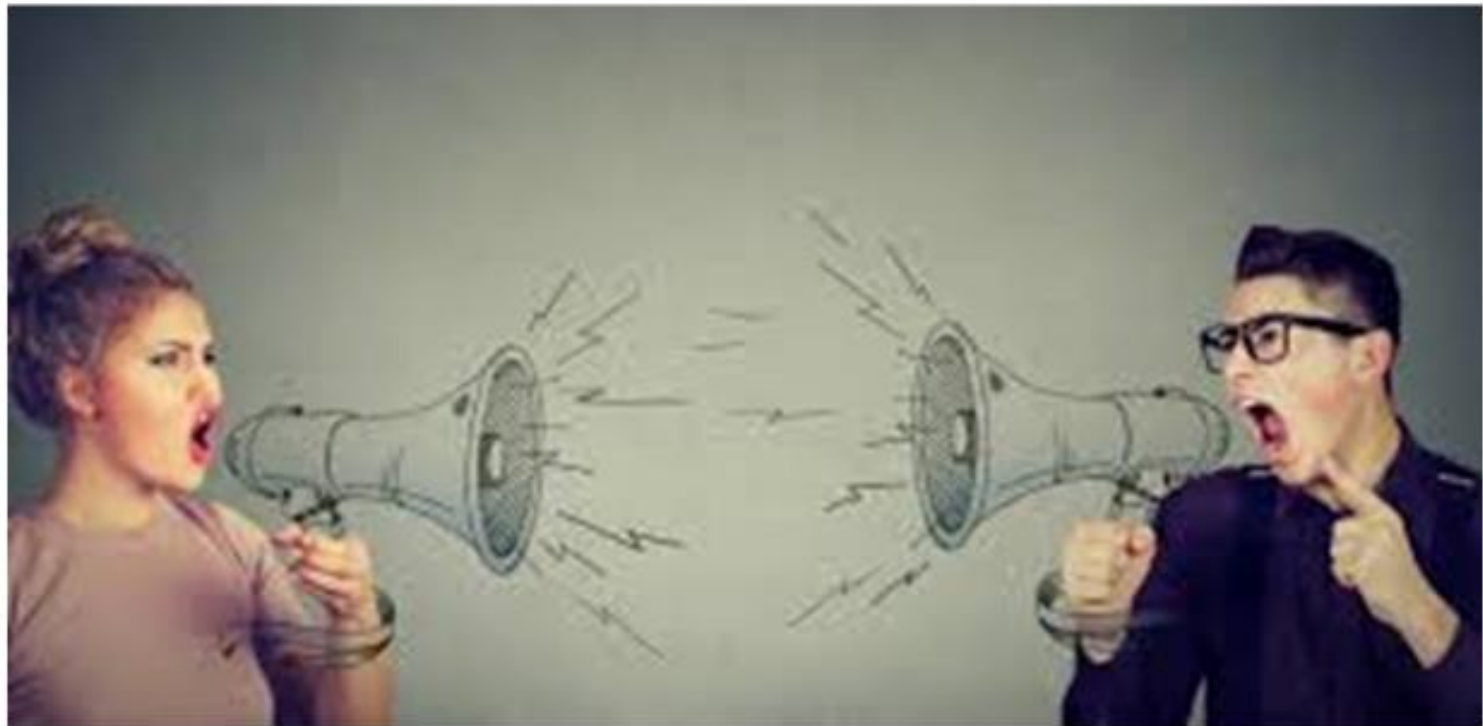
What have we seen  
and heard from the  
community during  
COVID





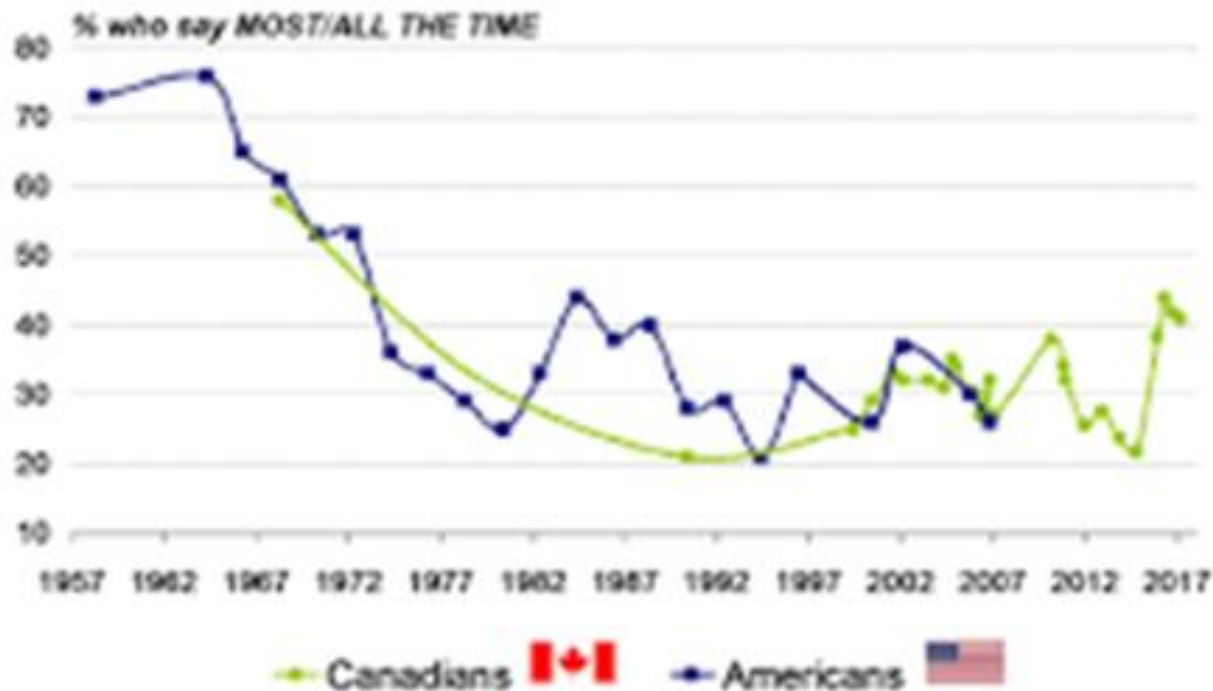
# **BURLINGTON TOGETHER**





## Tracking trust in government

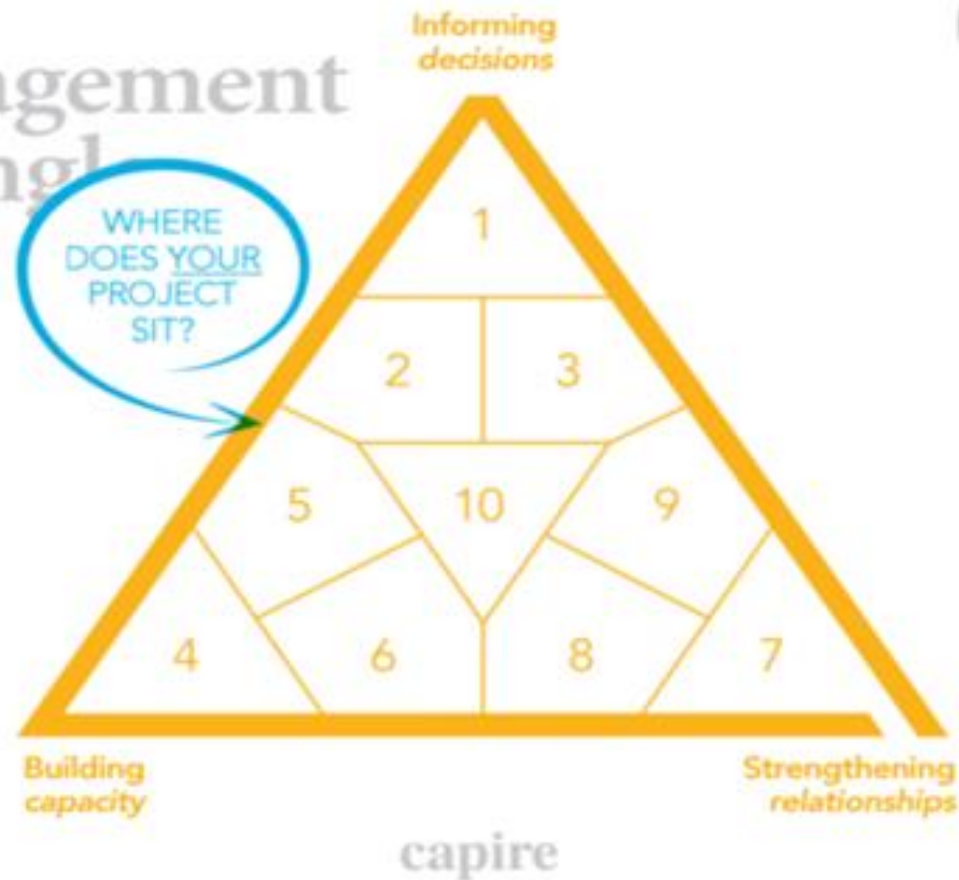
Q. How much do you trust the federal government to do what is right?



BASE: Canadians, February 20-26, 2017, n=1,009

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# the engagement triangle



## Capire Triangle of Engagement

# Strengthening Relationships and Building Trust



# The Foundational Truths of ABCD

1. Everyone has gifts

2. Everyone has something to contribute

3. Everyone cares about something and that passion is his or her motivation to act

# Workshop Discussion

Given the speakers we just heard and knowing what our V2F objectives are:

1. How do we need to shift our strategy to support these emerging needs?
2. Why is this important to the City of Burlington and what's standing in our way?

## Focus Area 5: Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation

- Shann McGrail, Executive Director, Haltech Regional Innovation Centre (15 minutes)
- Christine Swenor, Chief Information Officer, City of Burlington (10 minutes)
- Angela Morgan, Executive Lead - Customer Experience, City of Burlington (10 minutes)
- Workshop Discussion (15 minutes)

*Invited Guests: Gordon Kack, Robert Bevington and Sean Ballard  
from Burlington Economic Development's Board of Directors*

# Focus Area 5: Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation

Shann McGrail  
Executive Director  
Haltech Regional Innovation Centre

# Delivering Customer Centric Services w/Focus on Efficiency & Technology Transformation

November 24, 2020

Shann McGrail



# | Definitions

- **Customer Centric:** Designing interaction with government around the citizen/customer for the best experience.
- **Technology Transformation:** Complete overhaul of an organization's technology systems encompassing network architecture, hardware, software and how data is stored and accessed and affecting all of people, process and technology.
- **Digital Transformation:** The evolution of business activities, workflows, and processes to leverage the latest trends in digital technology and the impact such innovations are having on society.

# | Influences on Public Sector

## Technology Trends

- Adaptive Security
- Multichannel citizen engagement
- Digital Identity
- Anything as a service
- Analytics everywhere
- Digitally empowered workforce
- Augmented intelligence

Source: [Gartner](#)

## Customer Experience Trends

- Adaptive approaches to customer experience
- Digitizing the customer experience
- Virtual assistance
- Augmented Reality Services
- Mobile Experiences
- Behavioral Pairing

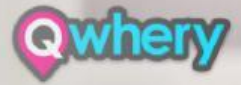
Source: [Hubspot](#)

## | Random facts and figures

- In Public Sector – typical IT spend is 1-3% of budget; Digital Transformers spend 7% (source – Digital Transformation Municipal World; Ben Perry)
- Globally, Canada ranks citizen demand as the primary driver of digital transformation\*(Deloitte – Digital Global Survey)
- 80% of companies who prioritize customer experience are reporting increases in revenue
- Customers will spend 17% more for a good experience

# | Burlington Innovation

# the problem



Content and services on municipal websites is **difficult to find**.

**Growing wait times** for citizens calling 311.

**Increasing costs** to handle rapid growth in call volumes.

**65%** of Americans search online for information about their government...

...yet, less than **10%** report finding what they need.

~ Pew Research Center



Community Engagement • Location Intelligence • Recreation System • Waste Collection • Parking & Tickets • Utilities

thesolution



### Increased Customer Satisfaction

Immediate responses equals  
reduced wait times



### Frees up city staff

to help with more complex  
questions

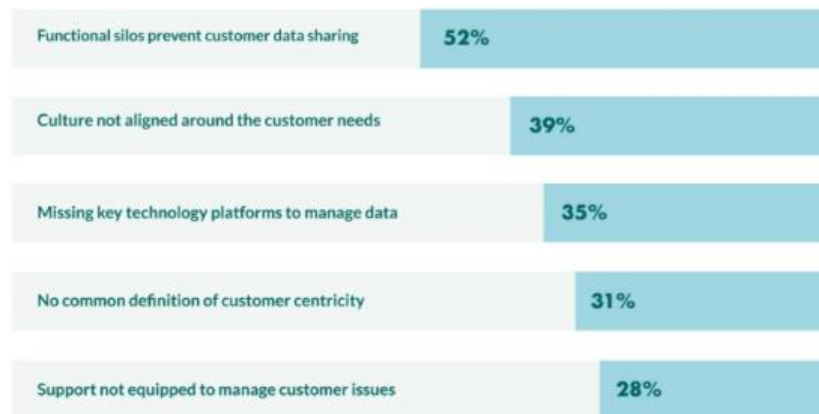


### Reductions overall

In cost per call, positively  
impacting the city's property  
taxes

# Challenges For Public Sector

## WHAT CHALLENGES DO YOU FACE IN ACHIEVING A TRULY CUSTOMER-CENTRIC ORGANIZATION?



## WHICH CHARACTERISTICS DO YOU THINK ARE MOST IMPORTANT IN ESTABLISHING A TRULY "DIGITAL NATIVE" CULTURE?



Source: [How to create a customer centric strategy](#)

## Improving customer experience can drive better critical outcomes for government agencies around the world.



### Increase trust

Satisfied customers are

**9x**

more likely to trust the agency providing the service



### Achieve stated missions

Satisfied customers are

**9x**

more likely to agree an agency is delivering on its mission



### Meet or exceed budgetary goals

Dissatisfied customers are

**2x**

more likely to reach out for help 3+ times



### Reduce risk

Dissatisfied customers are

**2x**

more likely to publicly express dissatisfaction



### Boost employee morale

Long-term organizational success is

**50%**

driven by organizational health and is mutually reinforced by customer experience

Source: Global results from Canada, France, Germany, Mexico, United Kingdom, and United States, McKinsey Public Sector Journey Benchmark Survey, 2018

# | The Art of the Possible



## City Service Priority Areas

**Transit, parking, roads, and sidewalks all identified as priority areas**

Service	Derived Importance	Performance	Priority Rank
Sidewalk and walkways	8.3	77%	1
Parking management	7.6	75%	2
Roadway and sidewalk maintenance	8.7	79%	3
Transit service	6.4	73%	4
Leaf collection	8.4	80%	5
Road (plowing, salting, sanding)	8.1	82%	6
Tree health and pest management	8.0	84%	7
By-law enforcement	7.3	84%	8
Council Customer Relations	7.1	86%	9
Surface water drainage	8.0	89%	10
Animal Control Services	6.9	88%	11
Recreation programs	7.2	94%	12
Customer Service	7.1	94%	13
Recreation facilities	7.7	95%	14
Maintenance of parks and green space	7.6	97%	15
Festivals and Events	7.1	97%	16
Service Burlington	6.3	96%	17
Parks, sports fields and trails	7.5	98%	18
Fire services	7.3	98%	19

n=757

Burlington Community Survey 2019

12

- “Hey Alexa...when will my sidewalk be repaired”?
- Real time smart notifications on traffic and parking options
- Snowplow tracking and updates
- Data as a foundation for new services that generate revenue or innovative partnerships
- Retention and attraction of talent

# Thank You

Shann McGrail

[shann.mcgrail@haltech.ca](mailto:shann.mcgrail@haltech.ca)



# Focus Area 5: Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation

Christine Swenor  
Chief Information Officer  
City of Burlington

# Council Workshop

## Strategic Plan Review



Delivering Customer Centric Services with a Focus on Efficiency and Technology

In 5 Years,

Government services  
will be more ...

... intelligent

Gartner defines digital government as government designed and operated to take advantage of digital data in optimizing, transforming and creating government services.

Source: Gartner



# Digital government

“... for governments, the key to digital transformation is not the technology itself, but the creation of a vision, the correct and faithful implementation of this vision, implemented by the correct individuals, and at the correct time, in order to achieve the desired cultural change. ... Governments need a new way to interact with their stakeholders: citizens, constituents and communities, as well as the various arms of the administration and the business community. The expectation of these stakeholders has grown considerably in light of technological change, and they will no longer be satisfied with such an obsolete and inefficient system.”

– Carla Cico, “Digital Transformation: The Challenge for Government”

## Info-Tech Insight

DX is not just about technology, and it is not the sole responsibility of either IT or business – it is the collective responsibility of an organization.

DX is all about the transformation of an enterprise to be more agile, adaptive, and innovative. It is a strategy that best utilizes both human capital and technologies. It is also about an organizational structure and culture that fits the overall vision of a digital enterprise.

Service modernization typically falls into three categories:

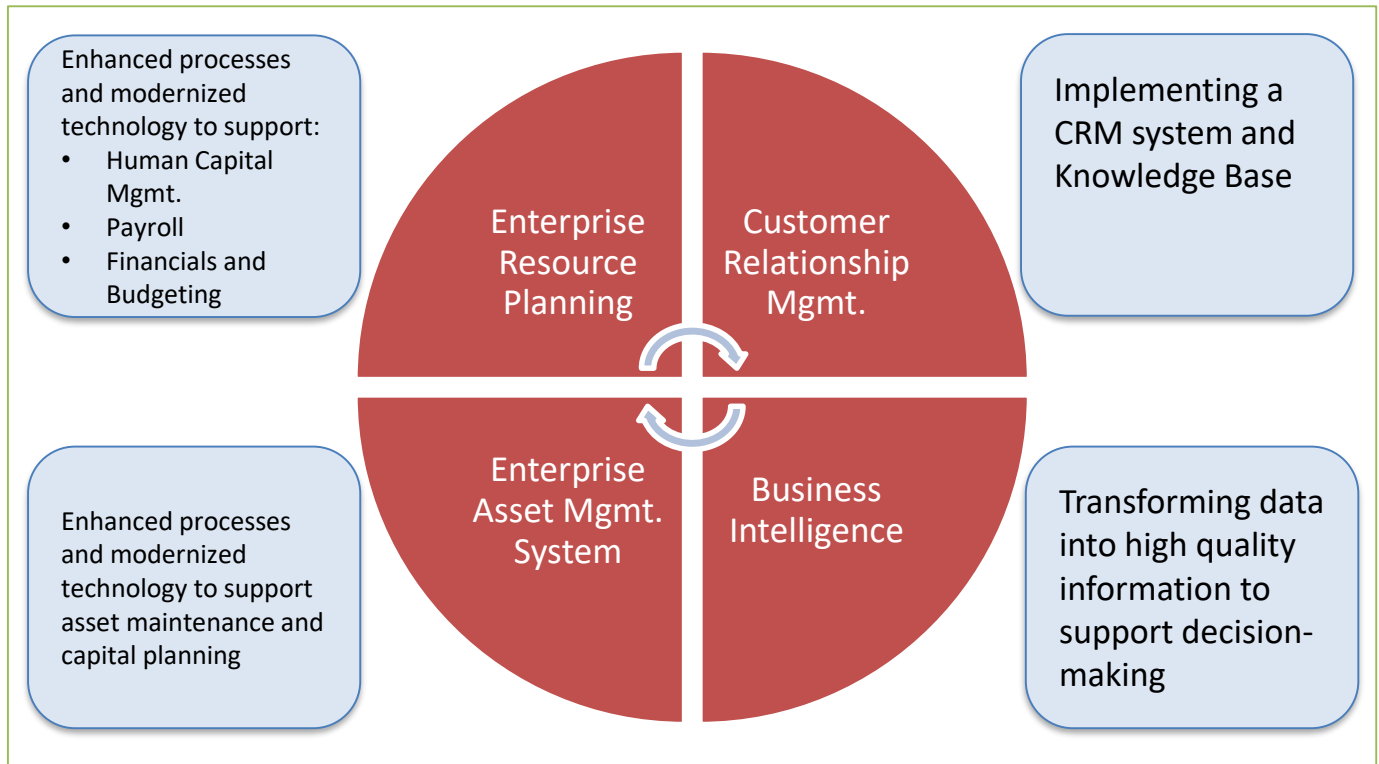
1. Optimizing business processes to improve efficiencies and reduce costs.
2. Improving access to services through multi-channel facilities for customers and facilitating field workers.
3. Improving decision making by providing timely information that is easy to consume, i.e. evidence-based decision making.

Source: Info-Tech Research Group



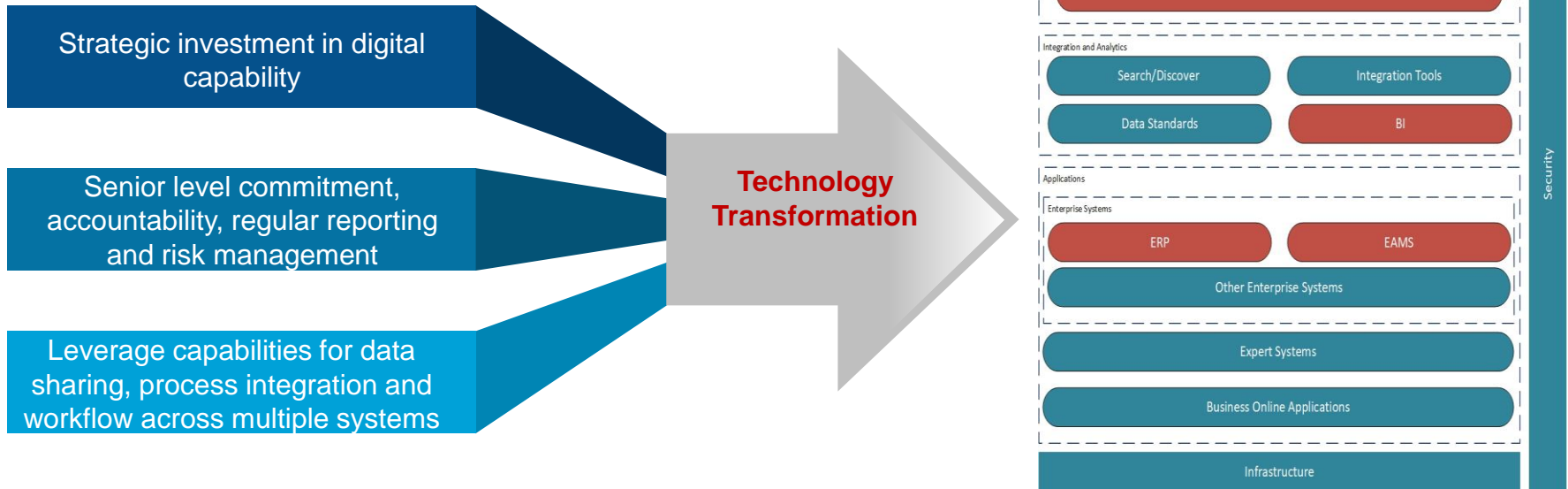
## Delivering Customer Centric Services with a Focus on Efficiency and **Technology Transformation**

### Corporate Transformational Initiatives





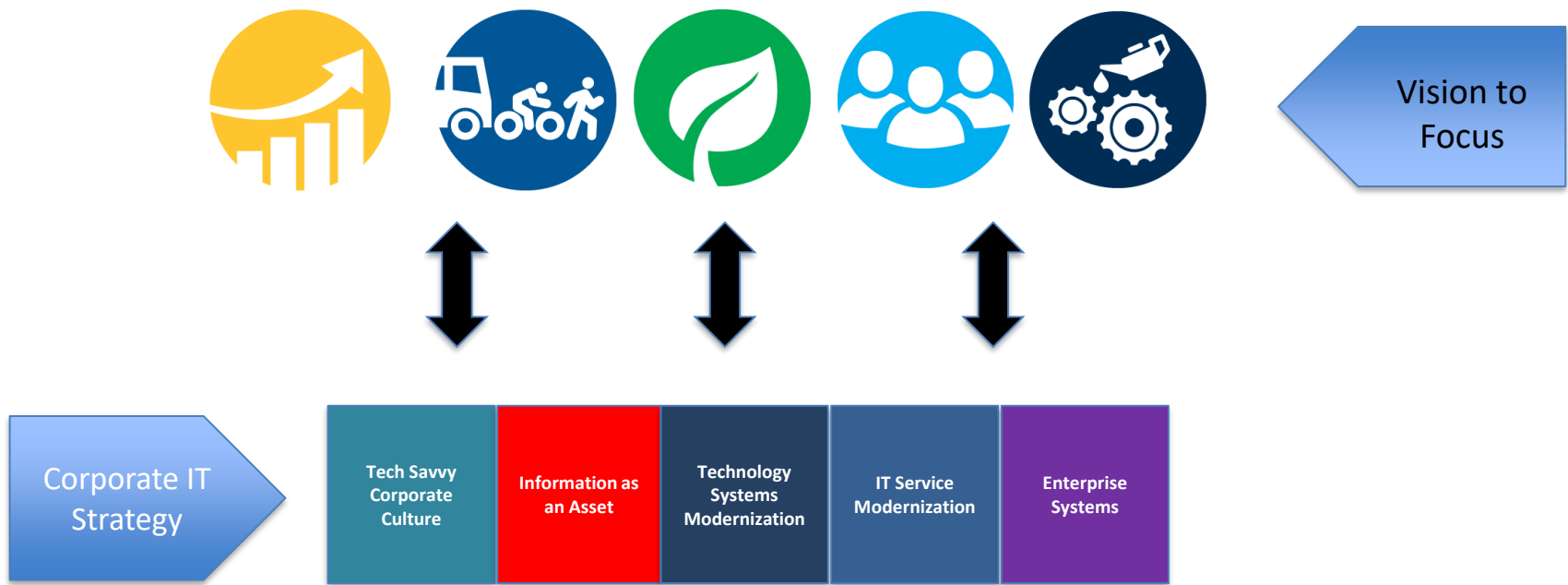
## Delivering Customer Centric Services with a Focus on Efficiency and **Technology Transformation**





**We will need to...**

Continue Implementation of the Corporate IT Strategy; Align and Support Vision to Focus





# Information & Cyber Security

Our commitment to....

Increasing corporate resilience to cyber-security threats through effective and proactive IT security management practices

IT Security Framework

Security Assessments

Incident Response

Controls & Audit

Preventative Controls

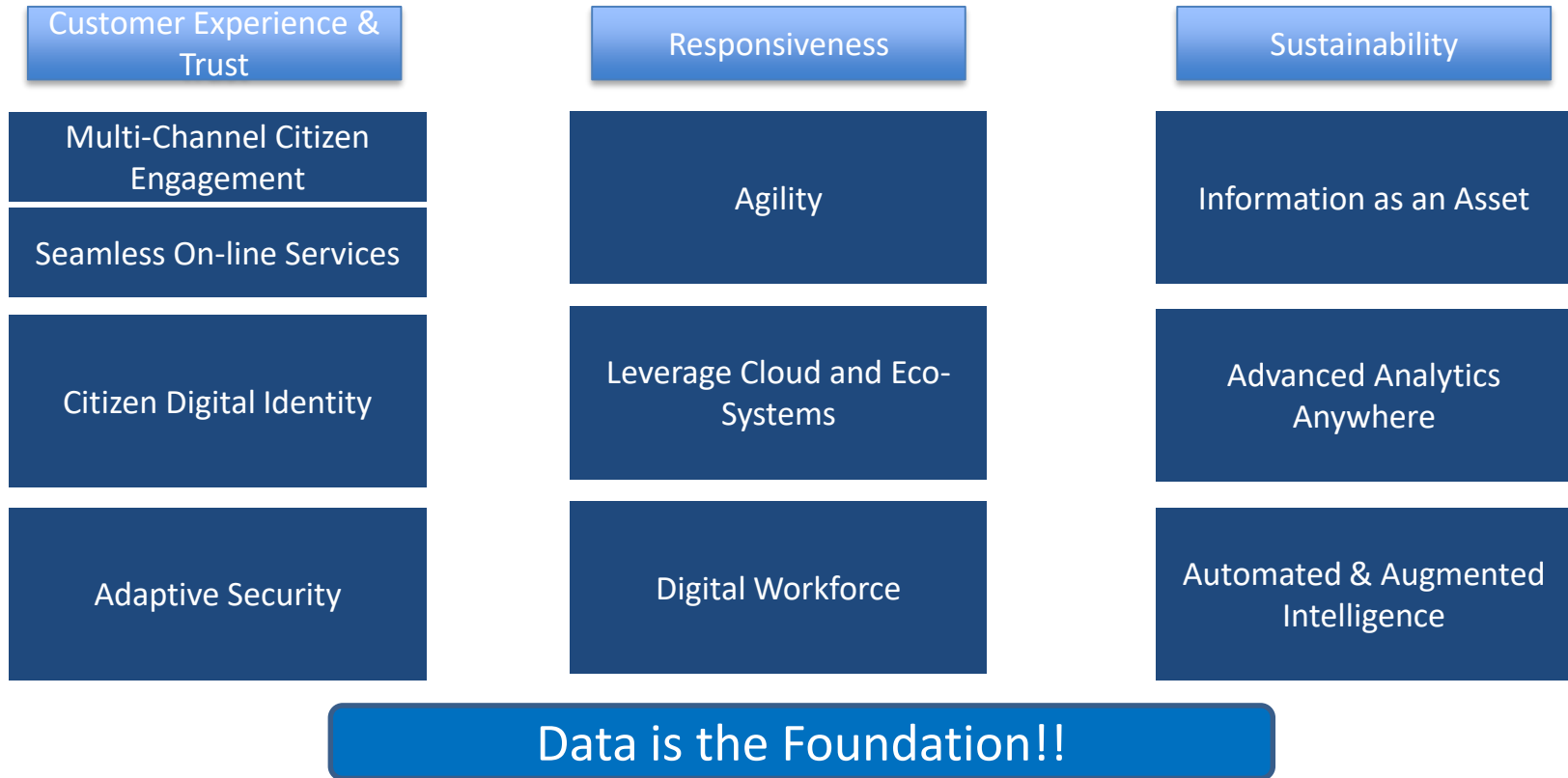
Monitoring & Reporting

User Education



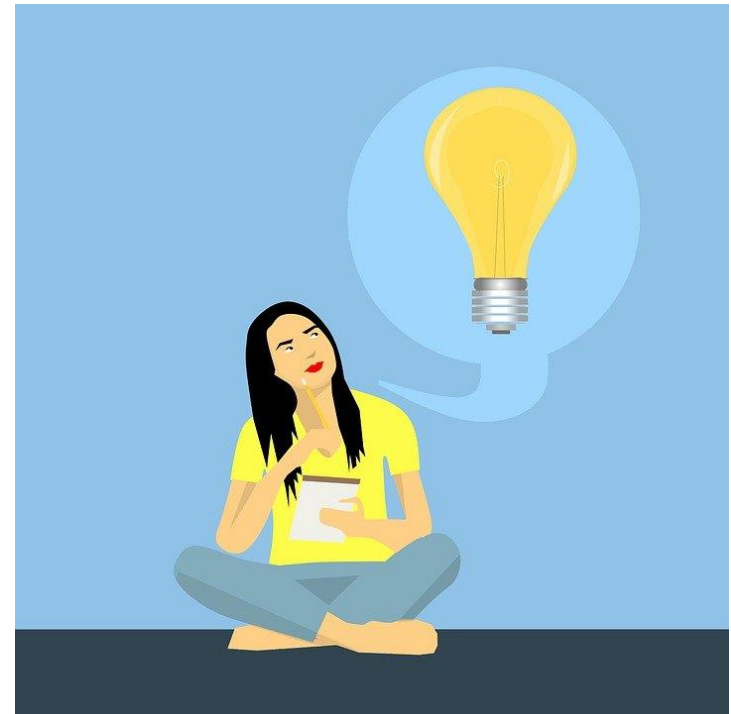
Virtual work environment, cloud adoption, and citizen-centric on-line services require adaptive and targeted security controls.

## Trends and Opportunities



# Additional Thoughts

- Accessible and transparent government; anytime, anywhere
- Iterative approach; deliver increments of value more quickly (not big bang)
- User adoption and buy-in; Look outbound in instead of inbound out
- Tap into ecosystem; partnerships; cloud solutions
- Consider effective and efficient
- Strong link between IT and business
- Skilled workforce
- Sustainability!!



# Challenges/Barriers

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Operating in a Pandemic

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Resistance to Change

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Legacy (siloeD) Systems

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Resource Capacity

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Sustainability

---

Pace of Change

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Increasing Expectations

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# Focus Area 5: Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation

Angela Morgan

Executive Lead - Customer Experience  
City of Burlington



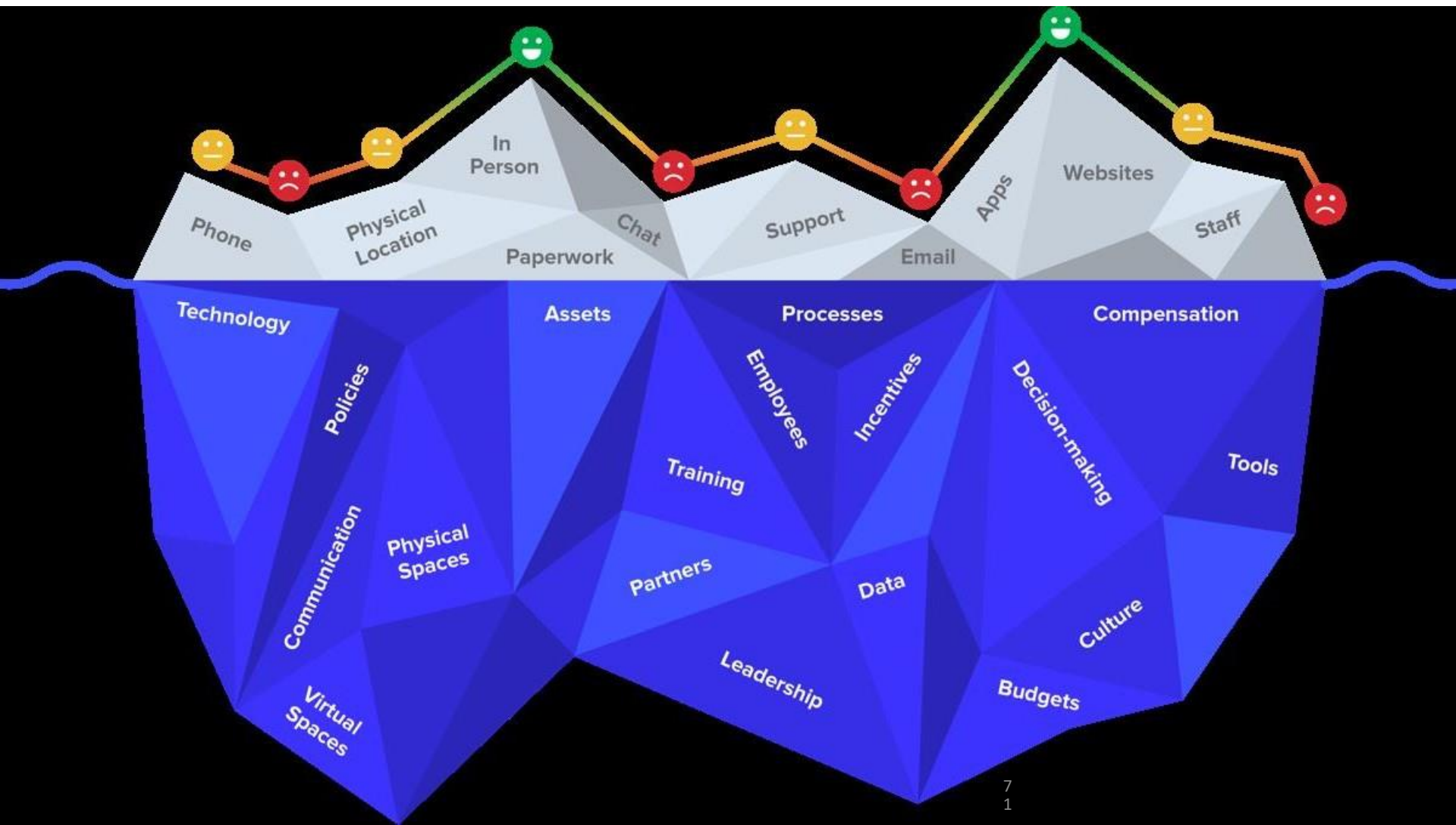
# Customer Experience

Looking Forward

# Customer Experience

- Customer Experience (CX) is the customers' perceptions of their interactions with the brand (City of Burlington)
- It encompasses all interactions
- It is exclusively about customers' perceptions
- CX is a complex ecosystem





# Public Organizations are Finally Embracing Customer Centric Services

## Why should government focus on the customer experience?

- Improved employee engagement
- Customers who engage, trust and forgive
- Lower cost, better run operations
- Improves overall brand



# Our Customers Have High Expectations

- Burlington has an outstanding reputation
- Customers can go elsewhere
- Customers are residents, constituents, property owners, business owners, developers, visitors, colleagues, students, and are diverse
- All deserve an exceptional customer experience, every time
- Customer journey mapping is key to great CX



# Customer Experience Vision

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We are an empowered team, building lifelong relationships and trust, through outstanding customer service and innovative solutions



# Delivering Customer-Centric Services with a focus on Efficiency & Technology Transformation

## CX Strategy

- Positions the City to meet this goal
- Envisions delivering a positive experience with every interaction
- Revamped Service Brilliance to focus on broader CX
- Service delivery is only one component of total customer experience
- Objectives have been simplified:

**Hear Me, Know Me, Inform and Assist Me**



# What's next

- One city, One customer – a comprehensive view
- Build CX competencies and understanding
- Outside In approach to processes – journey map with empathy
- Voice of the Customer program
- Apply data-driven insights and Design Thinking to customer experiences
- Update and expand the City's digital platform
- Multi-channel experiences





# Customer Experience

# Workshop Discussion

Given the speakers we just heard and knowing what our V2F objectives are:

1. How do we need to shift our strategy to support these emerging needs?
2. Why is this important to the City of Burlington and what's standing in our way?

# Themes from Workshop Discussions

- Overarching themes
  - Things are dynamic
  - Partnership-Based
  - Customer-Focused
  - Prioritizing and Resourcing

# Themes from Workshop Discussions

	Focus Area One Increasing Economic Prosperity and Community Responsive Growth Management	Focus Area Two Improving Integrated City Mobility	Focus Area Three Supporting Sustainable Infrastructure and a Resilient Environment
Primary Themes	<ul style="list-style-type: none"> <li>• Increase ease of doing business               <ul style="list-style-type: none"> <li>• Development application efficiency</li> <li>• Updated Zoning By-law</li> </ul> </li> <li>• Enhance Business Support               <ul style="list-style-type: none"> <li>• Small Business/Start-up Support</li> <li>• Leverage partners to help small business</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Changing Commuter Patterns               <ul style="list-style-type: none"> <li>• Transit Choices</li> <li>• Impacts of COVID-19</li> <li>• Future Trends</li> </ul> </li> <li>• Development of regional integrated transit strategy               <ul style="list-style-type: none"> <li>• Regional Integration</li> <li>• Planning and Infrastructure</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Priority Setting               <ul style="list-style-type: none"> <li>• Plan with Priorities and ROI</li> <li>• Adequate funding</li> <li>• Lower GHG</li> </ul> </li> <li>• Resident Mobilization</li> <li>• Partnerships</li> </ul>
Secondary Themes	<ul style="list-style-type: none"> <li>• Engage in priority and resource mapping</li> <li>• Focus on customer experience/service delivery</li> </ul>	<ul style="list-style-type: none"> <li>• Technology</li> <li>• Priority mapping</li> <li>• Staffing/Funding</li> <li>• Safety</li> <li>• Infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>• Tree Canopy</li> <li>• Carbon Pricing</li> </ul>

# What comes next?



Review,  
organize,  
summarize and  
share workshop  
information

Develop draft  
amendments,  
changes and/or  
additions to  
V2F and  
Strategic Plan

Application of risk  
assessment and  
mitigation  
approach to  
strategy objectives

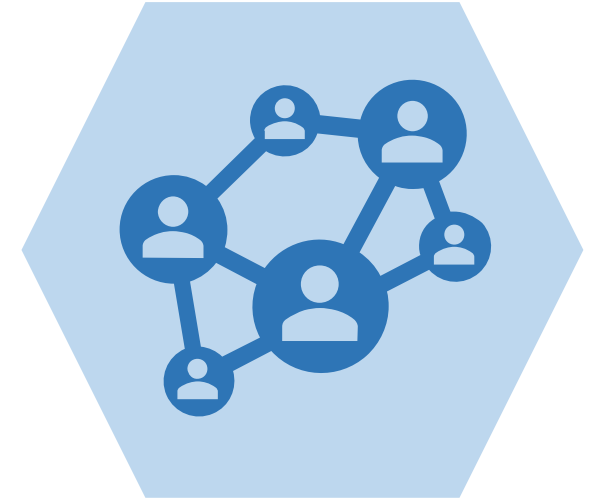
Amendments  
and  
adjustments 2<sup>nd</sup>  
Draft of V2F  
and Strategic  
Plan

Updated V2F  
Plan as of March  
2021

# Risk Governance Workshop

Tuesday, November 24, 2020

1:00 – 4:00 p.m.



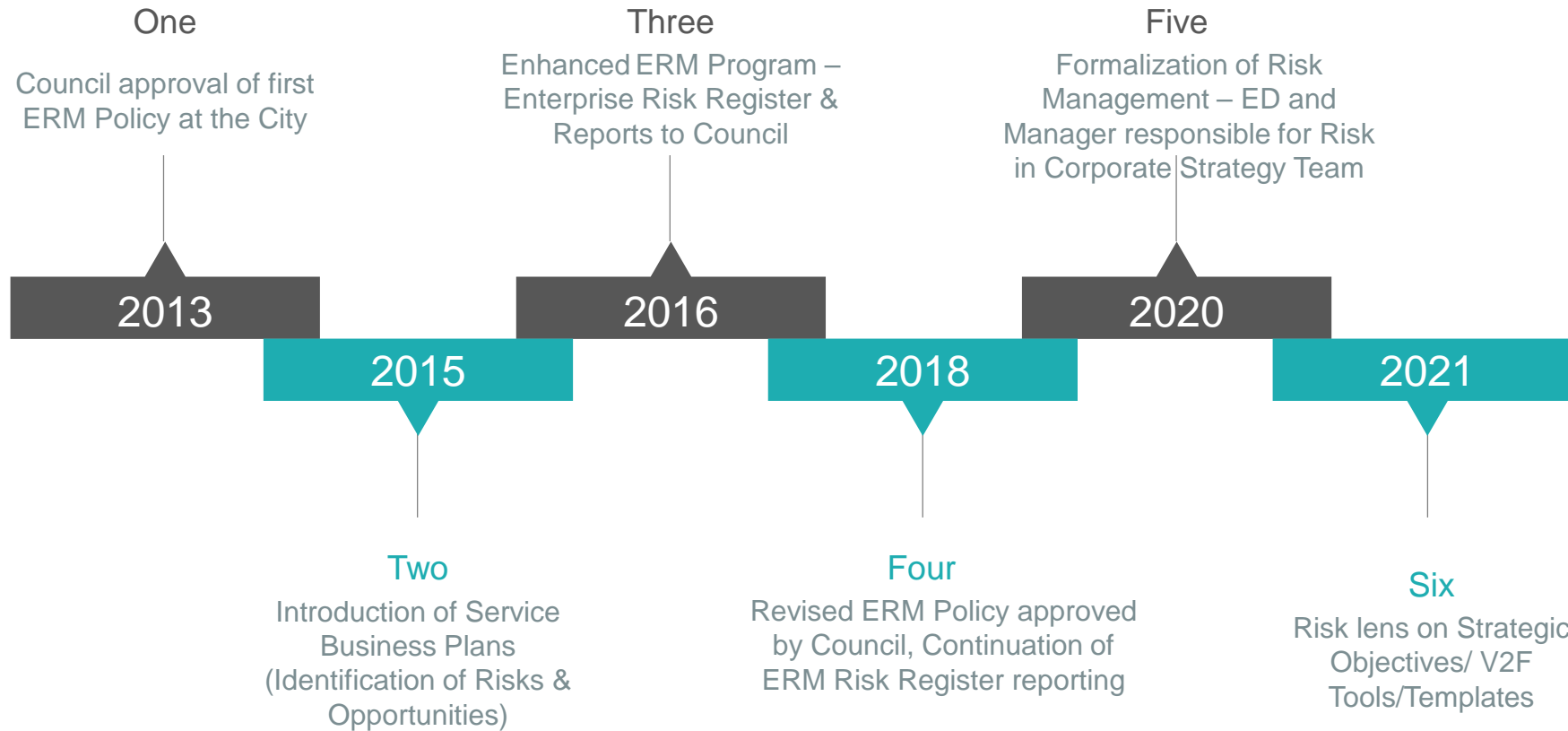
Sheila Jones  
Executive Director of Strategy, Risk  
and Accountability  
Corporate Strategy Team

Leah Bisutti  
Manager of Strategy and Policy  
Corporate Strategy Team



# Risk Management at the City of Burlington

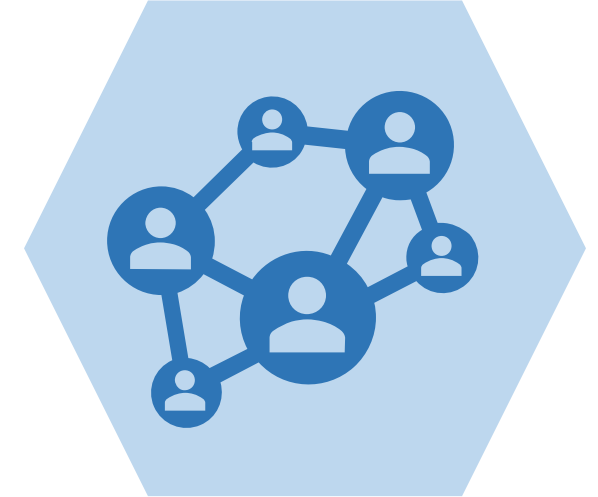
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# What's Next:



# Risk Governance Principles:



- Enable better decision making
- Take care of our assets
- Enable and encourage an innovative culture
- Support and foster sustainable continuous improvement
- Encourage and evolve our employee's understanding of risk management
- Support the achievement of our strategies, business plans, projects and activities
- Provide policies, tools and processes related to risk to guide staff across the organization
- Use COSO's "*Enterprise Risk Management – Integrating with Strategy and Performance*" (2017) as our framework foundation



# Policy Objectives:

- Establish a consistent and systematic approach to identify, assess, mitigate, monitor, and report on strategic, business, project, and operational risks.
- Establish a clear understanding of Council and employee risk management roles and responsibilities including decision making.
- Establish a framework that encourages and supports innovation and assists management in making appropriate decisions.
- Encourage Council and employees to communicate openly about risk.
- Provide Council and employees with appropriate risk management education and training in order to understand and manage risk.
- Provide policies and procedures to guide Council and employee actions relating to specific risks within our organization.



# Governance and Decision Making:

